

Fig. 1

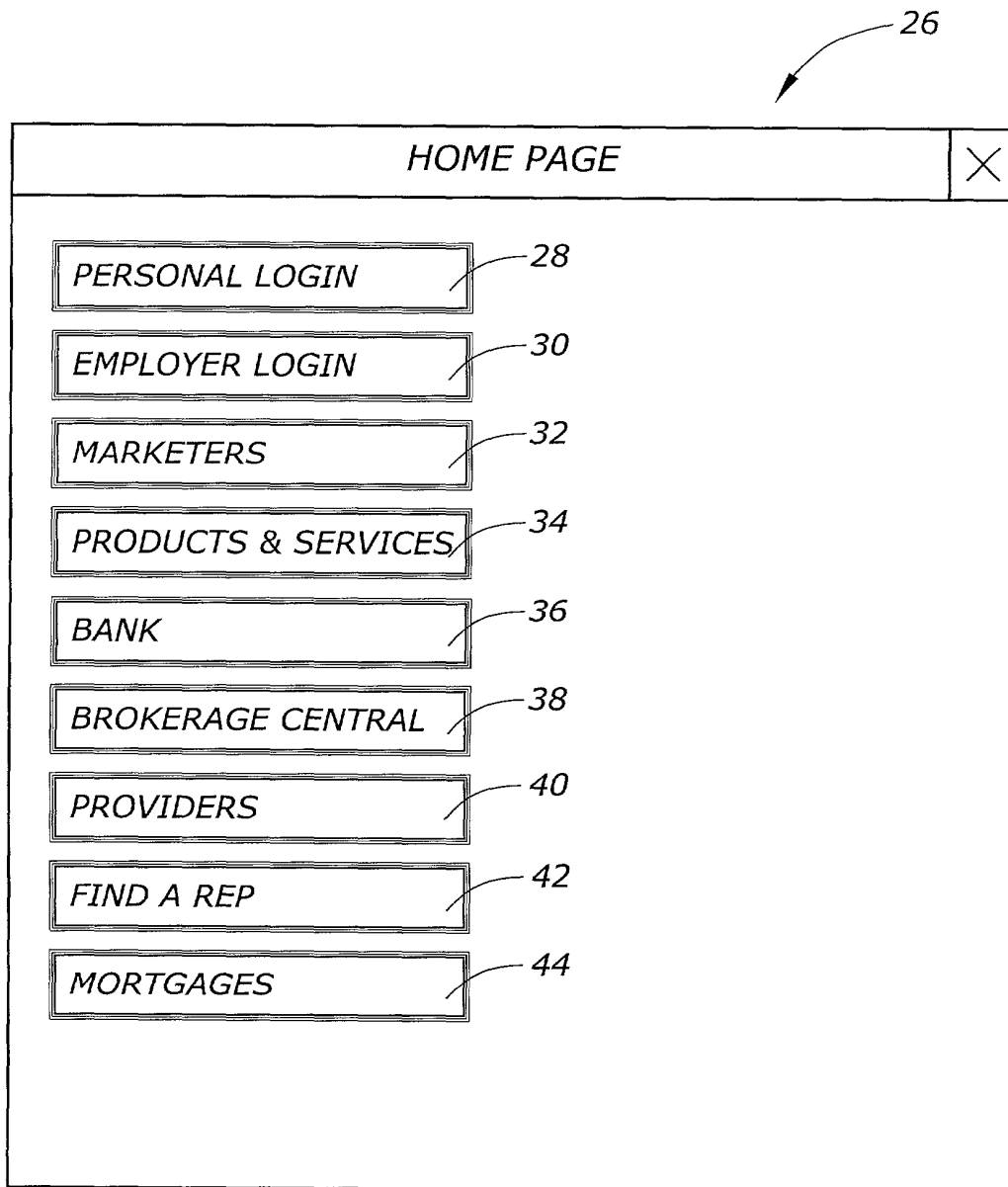


Fig. 2

46

EMPLOYER LOGIN×

HOME → EMPLOYER LOGIN

48 EXIT SECURE AREA

ID:

PIN:

CONTRACT:   
(OPTIONAL)

50

52

54

Fig. 3

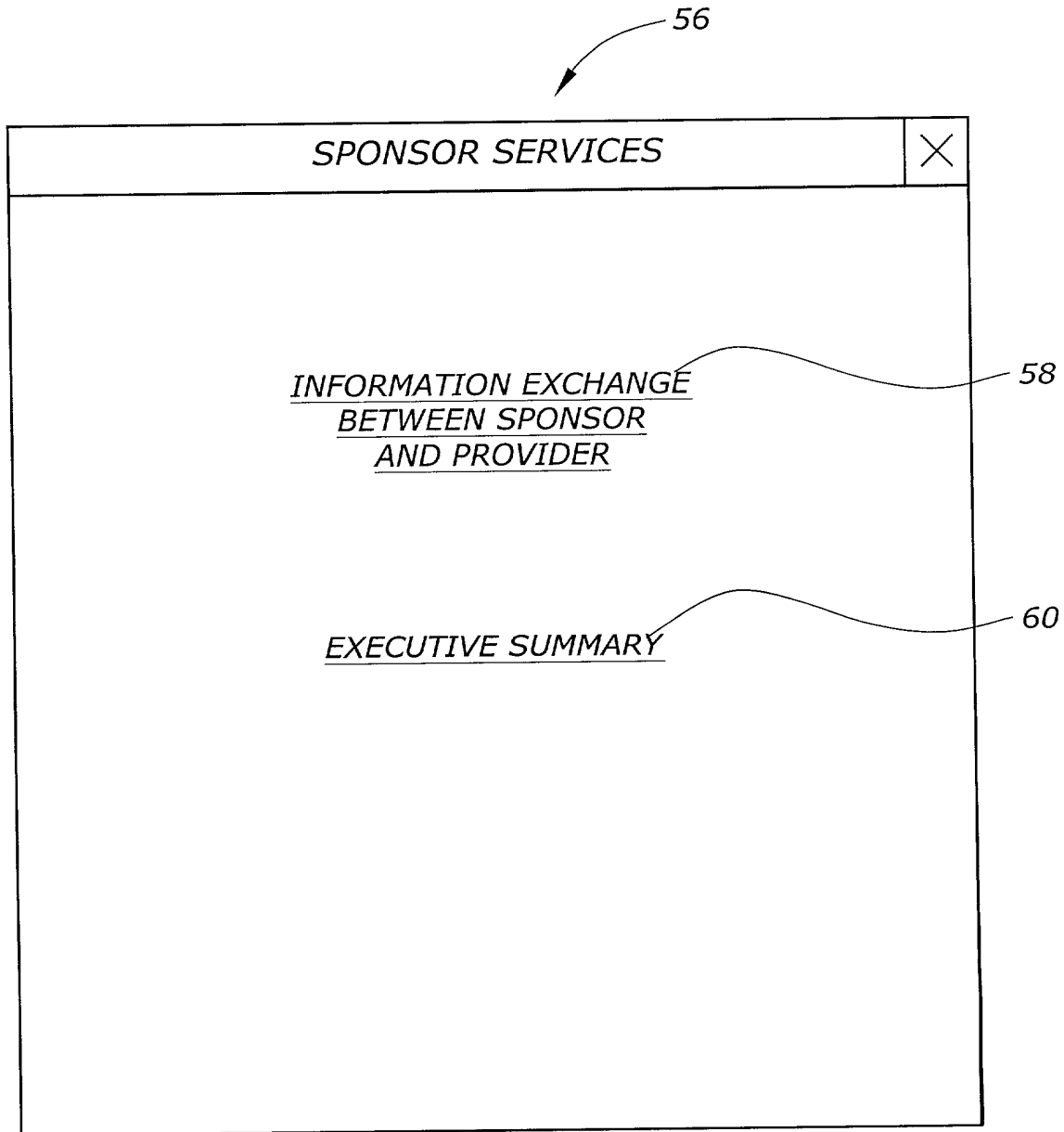


Fig. 4

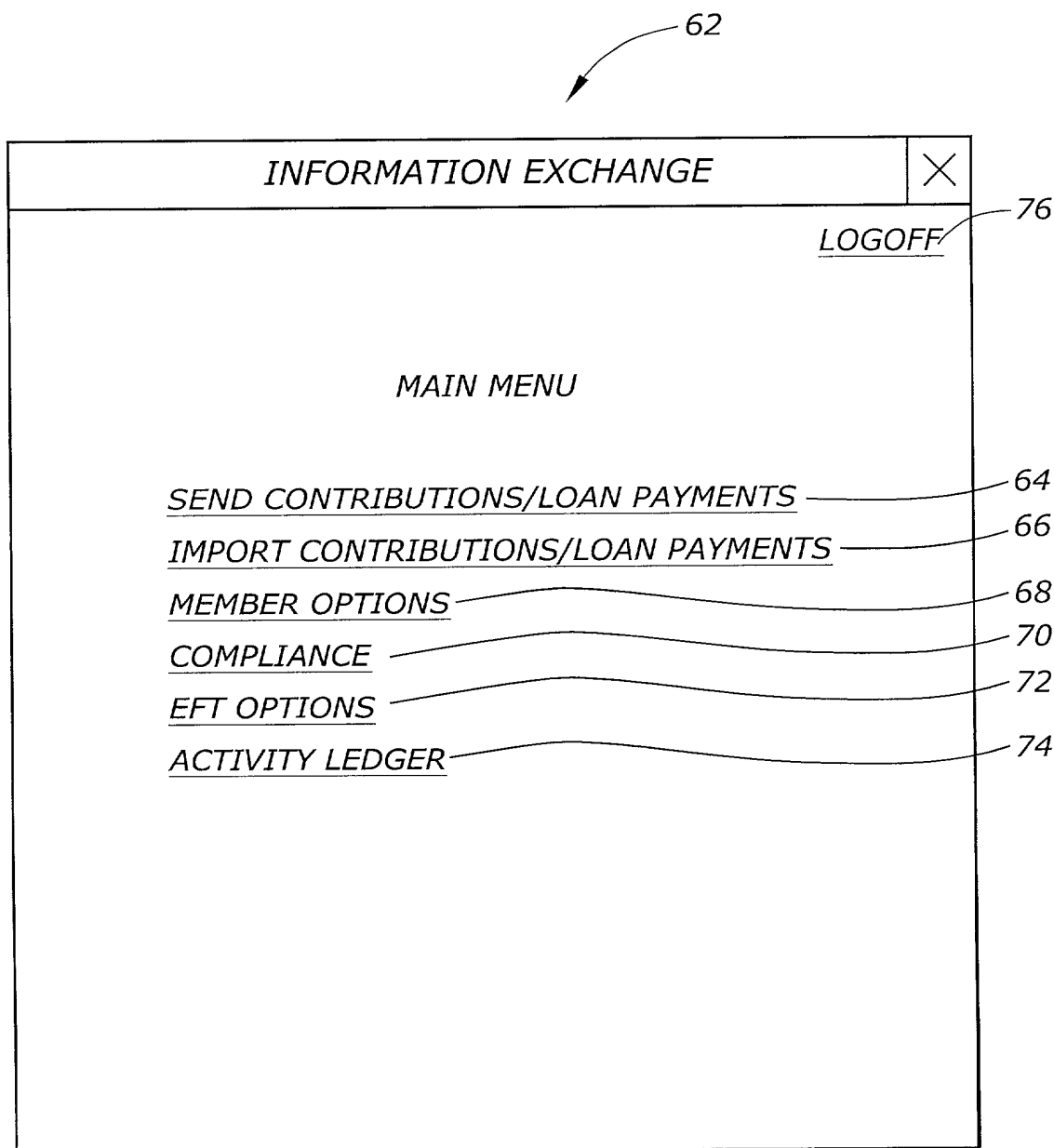


Fig. 5

78

INFORMATION EXCHANGE

INFORMATION EXCHANGE → SEND CONTRIBUTIONS/  
LOAN PAYMENTS

PAY PERIOD ENDING DATE:

82

☒

CONTRIBUTIONS

84

☒

LOAN PAYMENTS

CONTRIBUTION  
TYPES AVAILABLE

86

ADD>>

<<REMOVE

ORDER OF APPEARANCE  
FOR DATE ENTRY

88

ELECTIVE DEFERRAL  
EMPLOYER MATCH IN M

↑

↓

94

CONTINUE

Fig. 6

96

INFORMATION EXCHANGE
×

INFORMATION EXCHANGE → SEND CONTRIBUTIONS/ LOAN PAYMENTS

PAY PERIOD

PLAN YEAR

TAX YEAR

CONTRIBUTIONS

INACTIVE MEMBERS

LOANS

110 EMPLOYEE ID	112 NAME	114 MATCHING	116 DEFERRAL
ID1	NAME 1	19.23	38.46
ID2	NAME 2	23.08	46.15
ID3	NAME 3	15.38	30.77
ID4	NAME 4	30.77	61.54
ID5	NAME 5	26.92	53.89
SUBTOTALS		115.38	230.76
		TOTAL	346.14

SEARCH FOR:

SEARCH SORT BY NAME

CONTINUE

SAVE

CANCEL

Fig. 7

130

INFORMATION EXCHANGE

INFORMATION EXCHANGE

SEND CONTRIBUTIONS/  
LOAN PAYMENTS

PAY PERIOD

PLAN YEAR

TAX YEAR

132

134

136

INFORMATION FOR FINAL APPROVAL

CONTRIBUTIONS XXX

EMPLOYER MATCH XXX

ELECTIVE DEFERRAL XXX

LOAN PAYMENTS XXX

NEGATIVE CONTRIBUTIONS XXX

138

140

142

144

146

ACCOUNT NUMBER	ACCOUNT NAME	AMOUNT
XXXXXX	BANK 1	<input type="text"/>
XXX	BANK 2	<input type="text"/>
XXX	BANK 3	<input type="text"/>
SUBTOTALS		

SEND

SAVE

MAKE CHANGES

CANCEL

PRINT

Fig. 8



148

**INFORMATION EXCHANGE** ✕

INFORMATION EXCHANGE → SEND CONTRIBUTIONS/  
LOAN PAYMENTS

FILE TO IMPORT C:\IMPORT.CSV BROWSE OPEN

FILE TYPE:  
☐ FIXED FORMAT  
☒ DELIMITED

DELIMITER: COMMA ▼

PREVIEW

CANCEL NEXT

Fig. 9

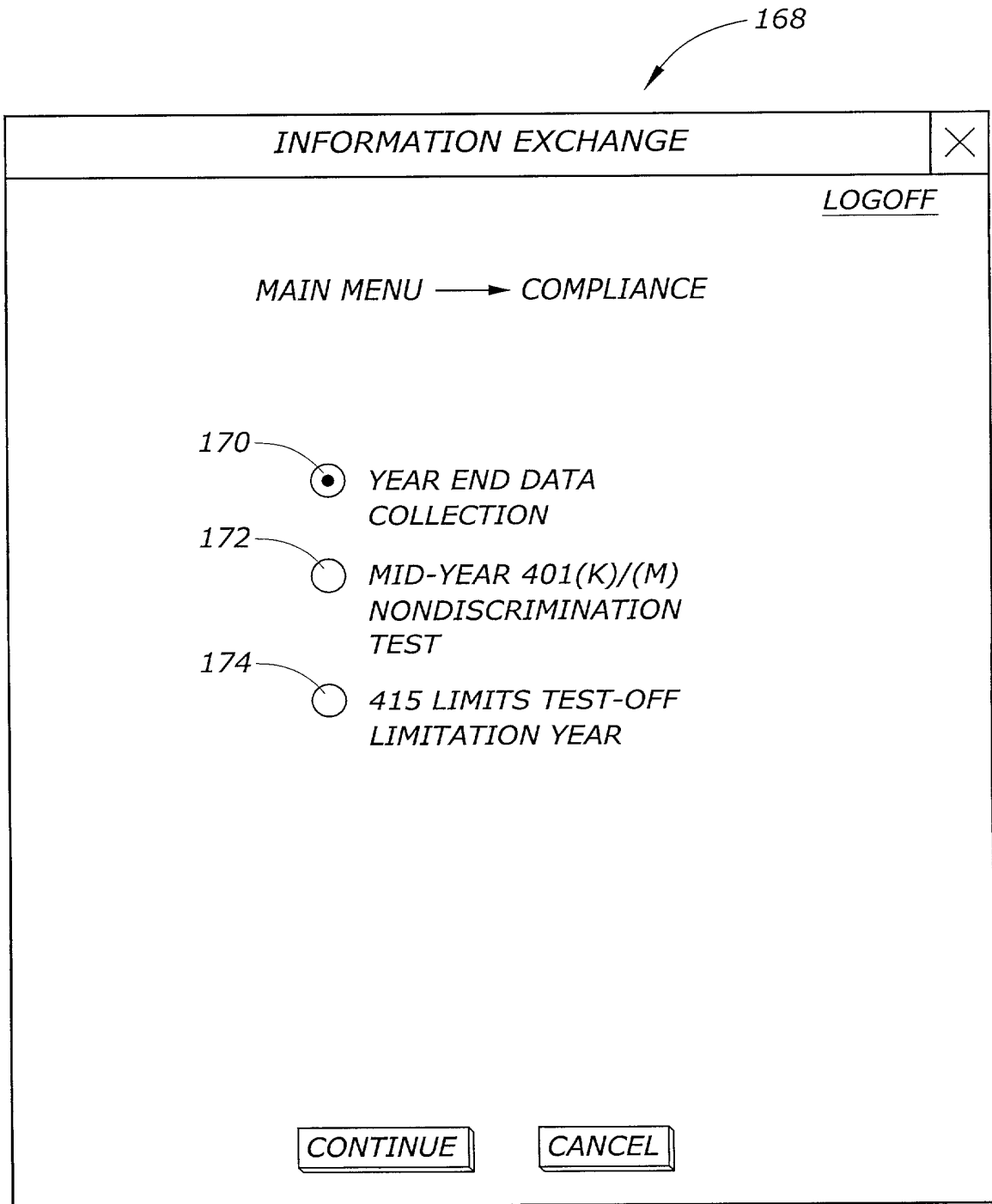


Fig. 10

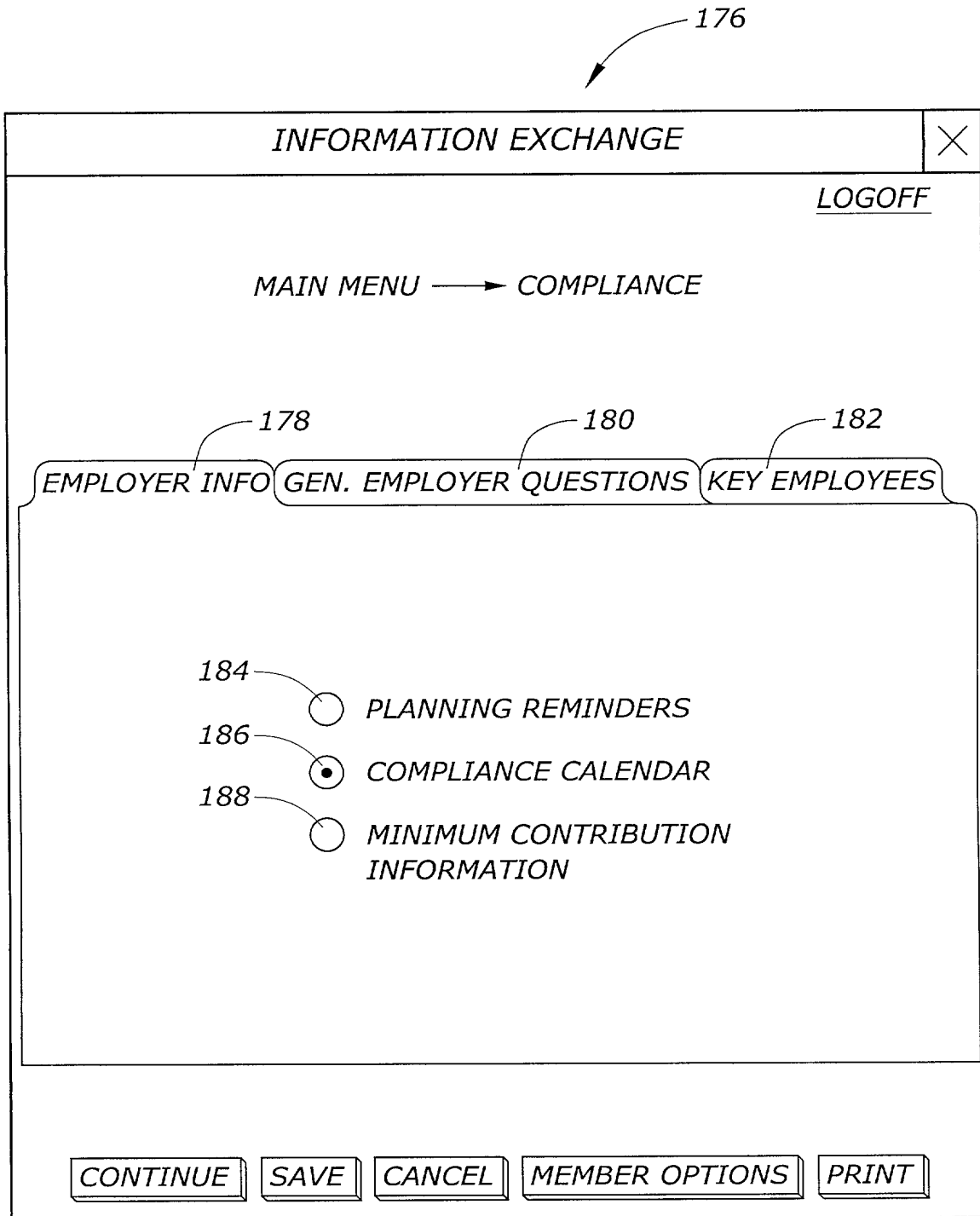


Fig. 11

190

X

INFORMATION EXCHANGE

LOGOFF

MAIN MENU —→ EFT OPTIONS

BANK ACCOUNTS

CHECKING ACCOUNT NUMBER

192 ☒ XXXXXXXXXXXX - BANK 1

194 ☐ XXXXXXXXXXXX - BANK 2

196 ☐ XXXXXXXXXXXX - BANK 3

198 VIEW/CHANGE 200 ADD 202 DELETE CANCEL

Fig. 12

204

X
**INFORMATION EXCHANGE**

206

DATE/TIME  
SUBMITTED

MM/DD/YY  
HH:MM

MM/DD/YY  
HH:MM

MM/DD/YY  
HH:MM

208

ACTIVITY

CONTRIBUTIONS/  
LOAN PAYMENT

MEMBER ADD

EFT SIGNUP

210

EFFECTIVE  
DATE

MM/DD/YY  
HH:MM

MM/DD/YY  
HH:MM

MM/DD/YY

212

AMOUNT

\$280.54

N/A

N/A

214

STATUS

SUBMITTED

SUBMITTED

SUBMITTED

216

REQUEST  
NUMBER

XXXXX

XXXXX

PRINT

Fig. 13

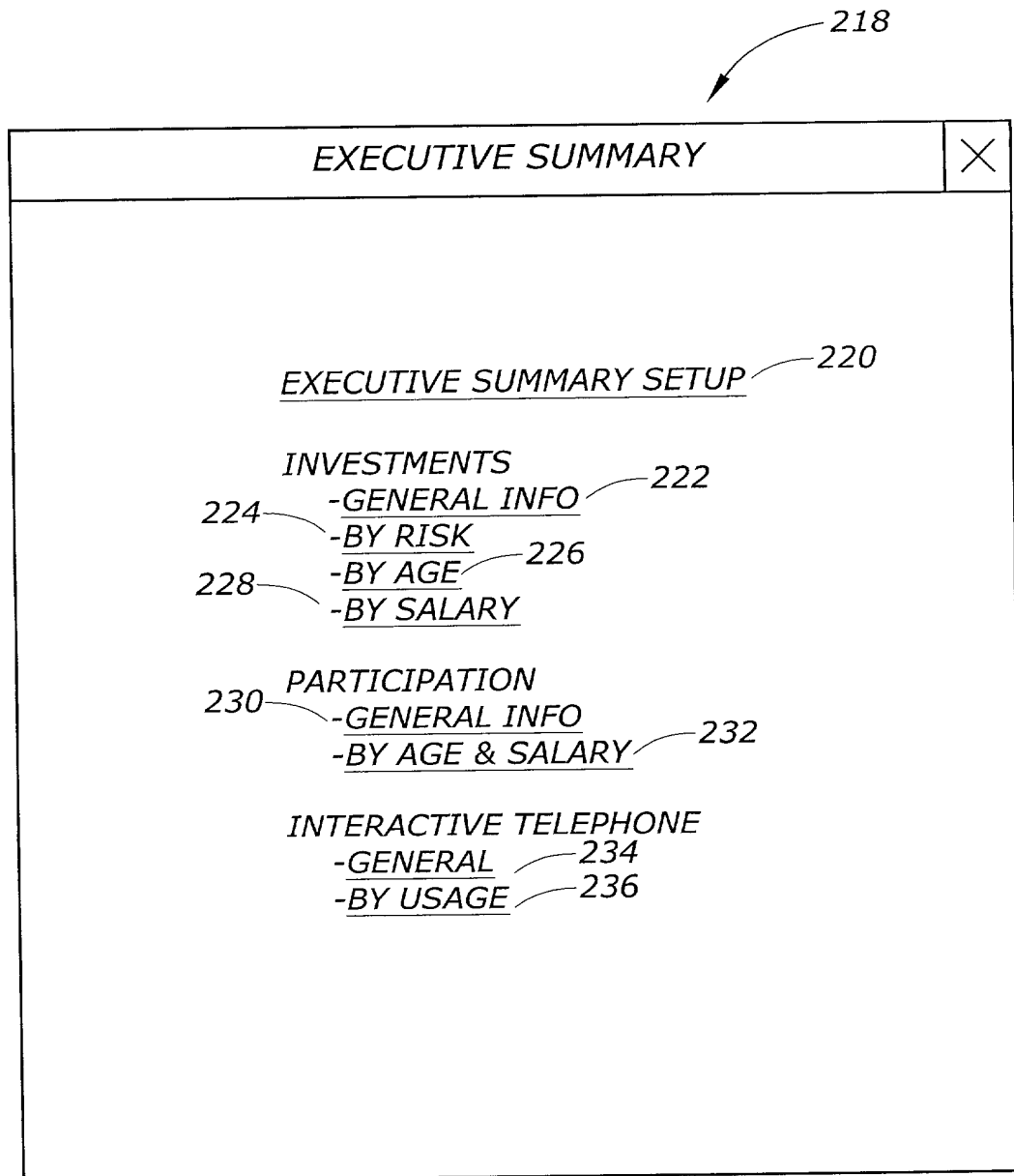


Fig. 14

238

EXECUTIVE SUMMARY SETUP

SUMMARIZE BY:

☒ CONTRACT 240

☐ LOCATION 242

LOCATION 244

SIZE OF GRAPHS

☒ LARGE 246

☐ SMALL 248

250

252

CONTINUE

RESET

Fig. 15

254

×

INVESTMENTS - GENERAL INFORMATION

↑

CURRENT INVESTMENT OPTIONS

RISK LEVEL	INVESTMENT OPTION
CONSERVATIVE	MONEY MARKET
CONSERVATIVE	GUARANTEED
MODERATE	BOND & MORTGAGE
MODERATE	GOVERNMENT SECURITIES
MODERATE	BOND EMPHASIS BALANCED
MODERATE	STOCK EMPHASIS BALANCED
DYNAMIC	U.S. STOCK
DYNAMIC	REAL ESTATE
DYNAMIC	STOCK INDEX 500
DYNAMIC	MEDIUM COMPANY VALUE
DYNAMIC	MEDIUM COMPANY BLEND
AGGRESSIVE	INTL STOCK
AGGRESSIVE	SMALL COMPANY BLEND

↓

Fig. 16A



INVESTMENTS - GENERAL INFORMATION						
TREND OF PLAN INVESTMENTS						
INVESTMENT NAME	1995		1996		1997	
MONEY MARKET	\$43,910	1.5%	\$43,910	1.5%	\$43,910	1.5%
GUARANTEED	\$498,924	17.6%	\$829,679	21.4%	\$635,490	14.1%
BOND & MORTGAGE	\$423,162	14.9%	\$716,424	18.5%	\$959,138	21.3%
GOVERNMENT SECURITIES	\$19,825	0.7%	\$20,532	0.5%	\$22,632	0.5%
BOND EMPHASIS BALANCED	\$18,732	0.7%	\$20,608	0.5%	\$23,335	0.5%
STOCK EMPHASIS BALANCED	\$15,537	0.5%	\$18,076	0.5%	\$21,356	0.6%
U.S. STOCK	\$838,920	29.6%	\$1,038,187	26.8%	\$1,378,464	30.7%
REAL ESTATE	\$12,844	0.5%	\$13,879	0.4%	\$15,518	0.3%
STOCK INDEX 500	\$49,558	1.7%	\$59,107	1.5%	\$78,536	1.7%
MEDIUM COMPANY VALUE	\$89,479	3.2%	\$101,575	2.6%	\$137,616	3.1%
MEDIUM COMPANY BLEND	\$101,423	3.6%	\$120,066	3.1%	\$151,363	3.4%

Fig. 16B

254

256

258

259

260

262

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268

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272

274

INVESTMENTS-GENERAL INFORMATION							X
TREND OF PLAN INVESTMENTS							↑
INVESTMENT NAME	1995		1996		1997		
INTL STOCK	\$542,942	19.1%	\$674,587	17.4%	\$758,214	16.9%	
SMALL COMPANY BLEND	\$182,912	6.4%	\$212,018	5.5%	\$256,848	5.7%	
TOTALS	\$2,838,168	100%	\$3,876,947	100%	\$4,494,394	100%	
LOANS	\$0	N/A	\$0	N/A	\$33,999	N/A	
GRAND TOTAL	\$2,838,168	100%	\$3,876,947	100%	\$4,528,393	100%	↓

254

Fig. 16C

286

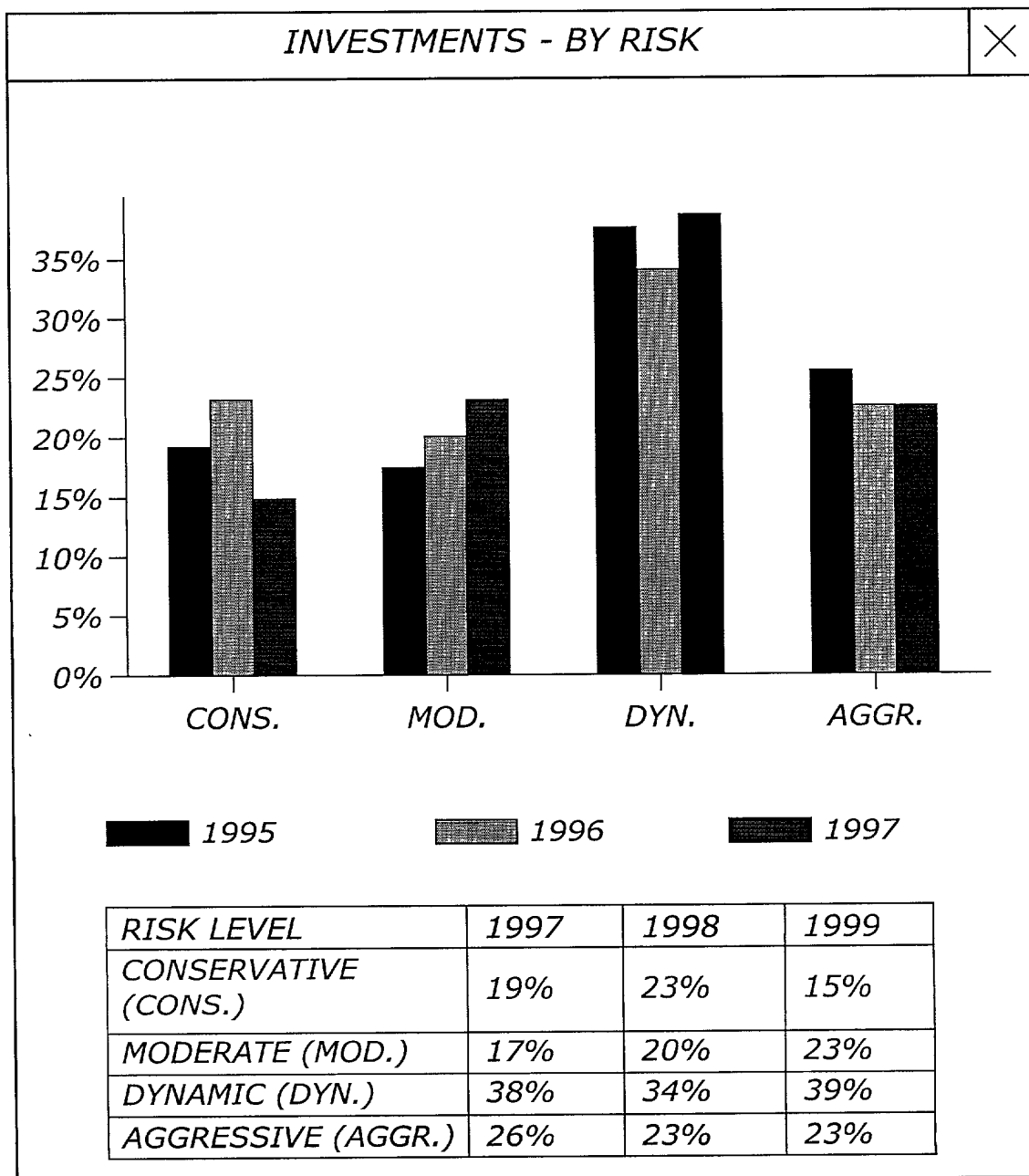


Fig. 17

288

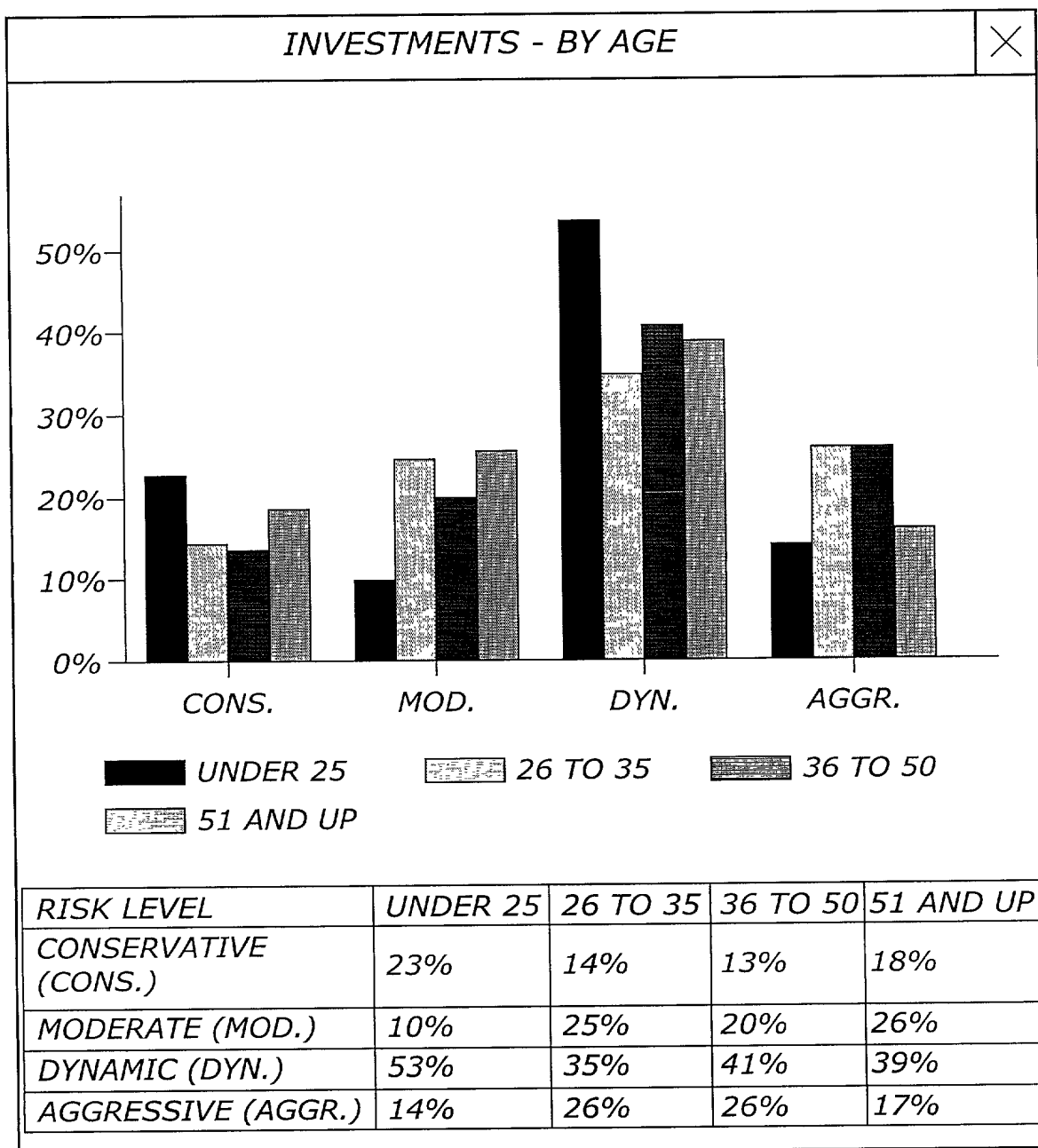
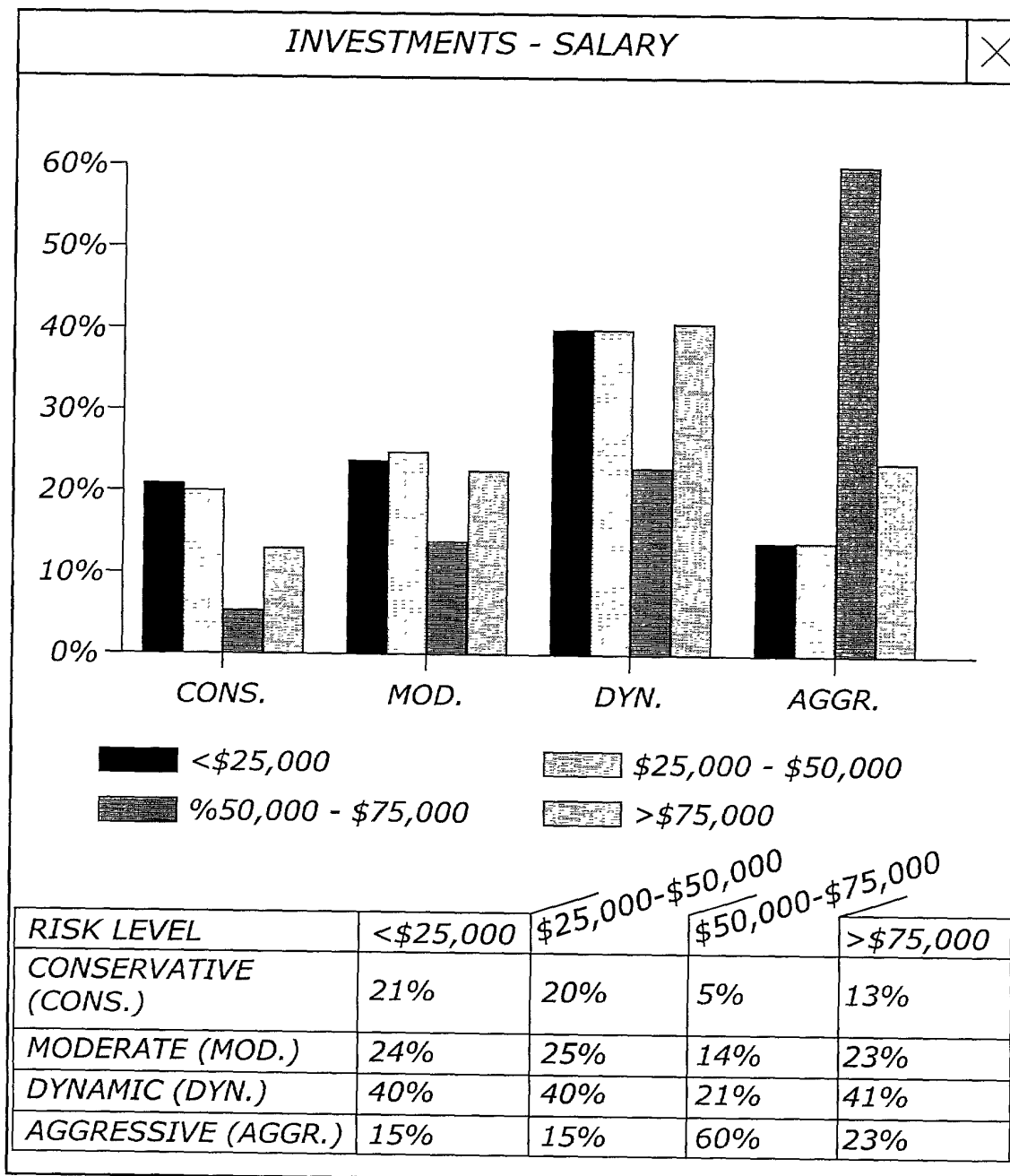


Fig. 18

290



**Fig. 19**

292

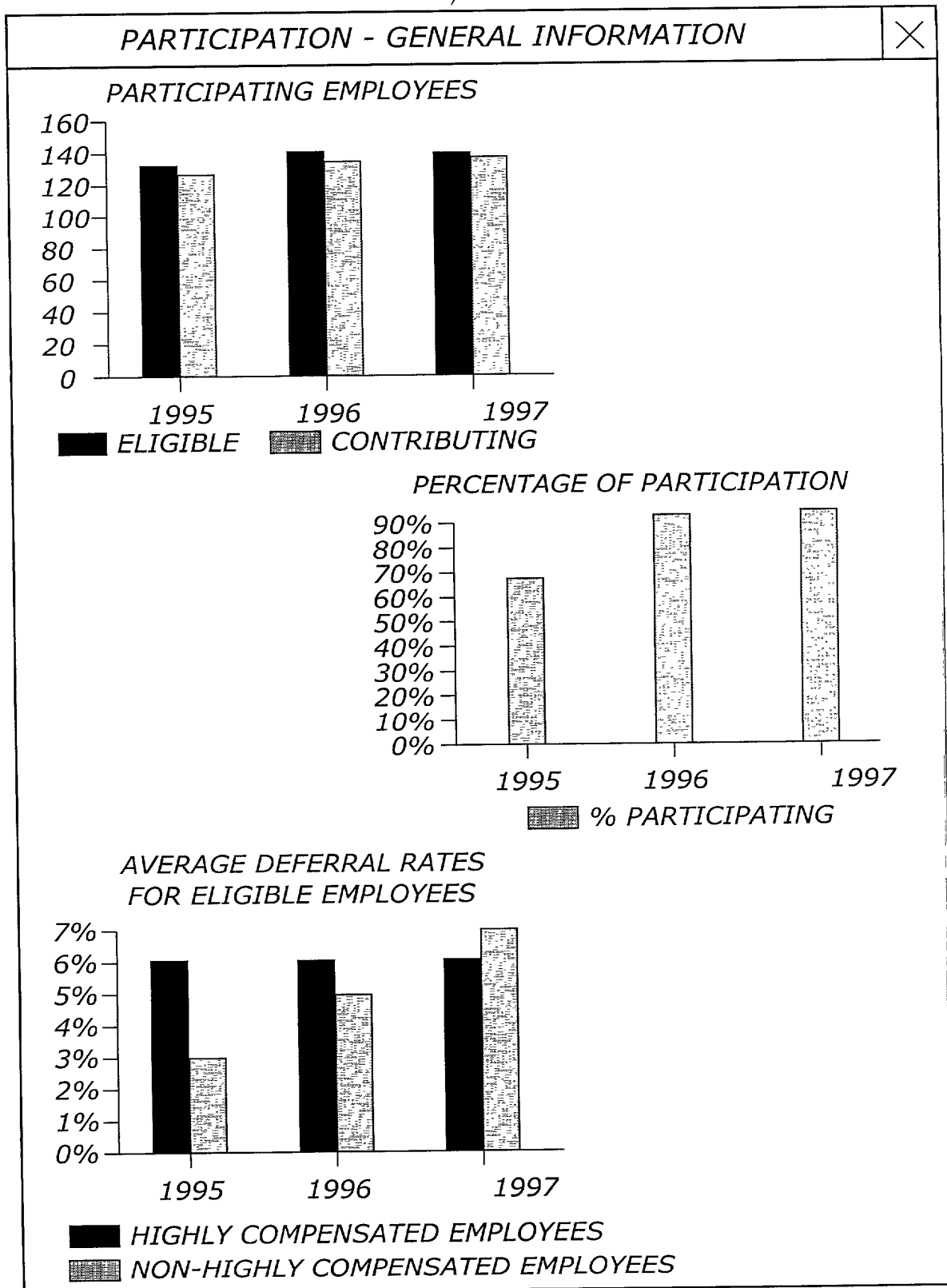


Fig. 20

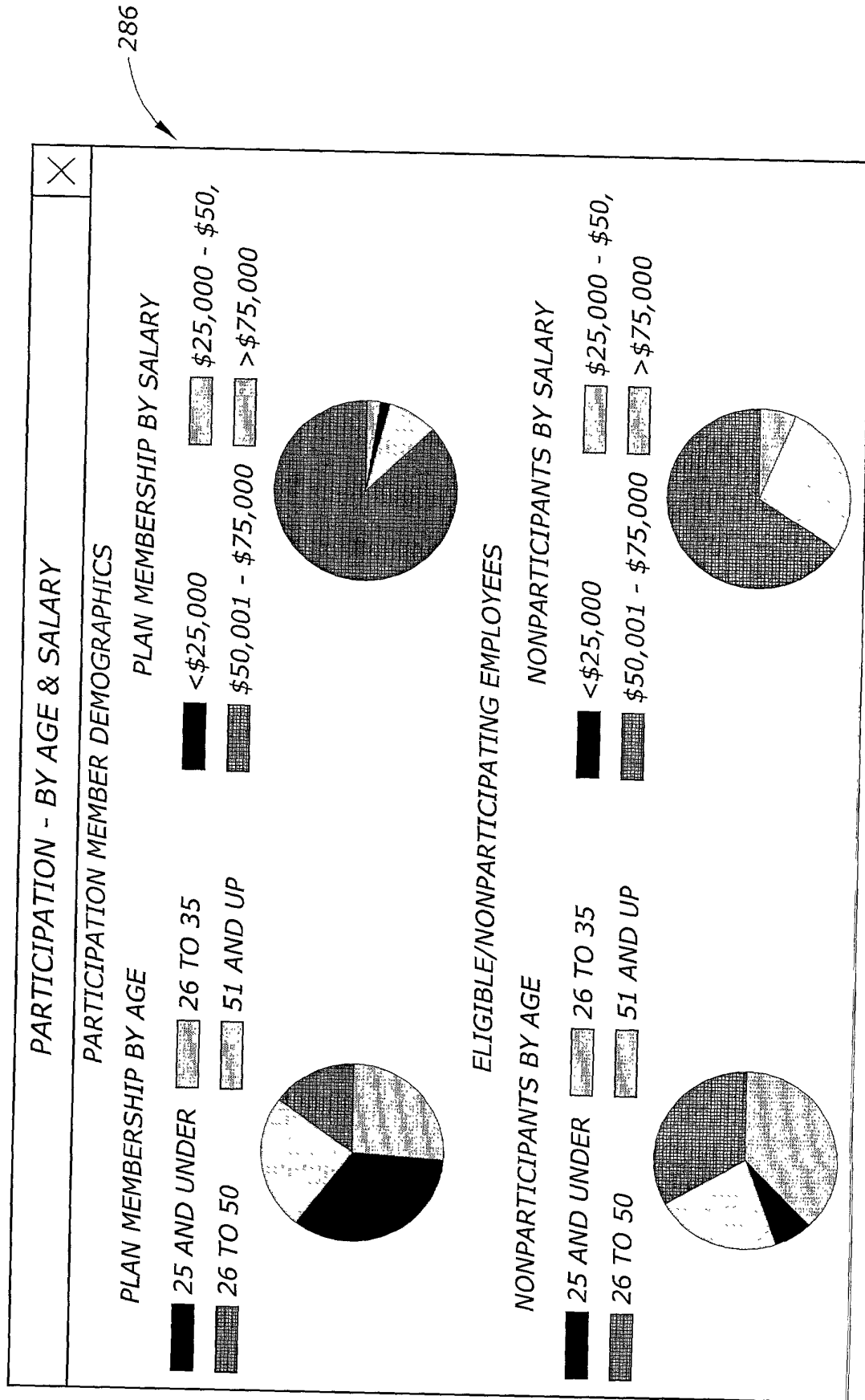


Fig. 21

296

INTERACTIVE TELEPHONE - GENERAL INFORMATION

HERE'S A SUMMARY OF YOUR  
INTERACTIVE TELEPHONE  
USAGE:

TOTAL PLAN MEMBERS WITH ACTIVE PINS	184
TOTAL PLAN MEMBERS THAT ACCESSED USAGE	25 14%

HERE ARE THE NUMBER OF INTERACTIVE  
TELEPHONE REQUESTS MADE BY YOUR  
PLAN MEMBERS FOR THE PAST YEAR:

INVESTMENT INFORMATION	77
ACCOUNT SUMMARY	103
ACCOUNT BALANCE	89
CURRENT INVESTMENT DIRECTION	6
PIN CHARGES	7
INVESTMENT TRANSFERS	12
TOTAL REQUESTS	294

Fig. 22



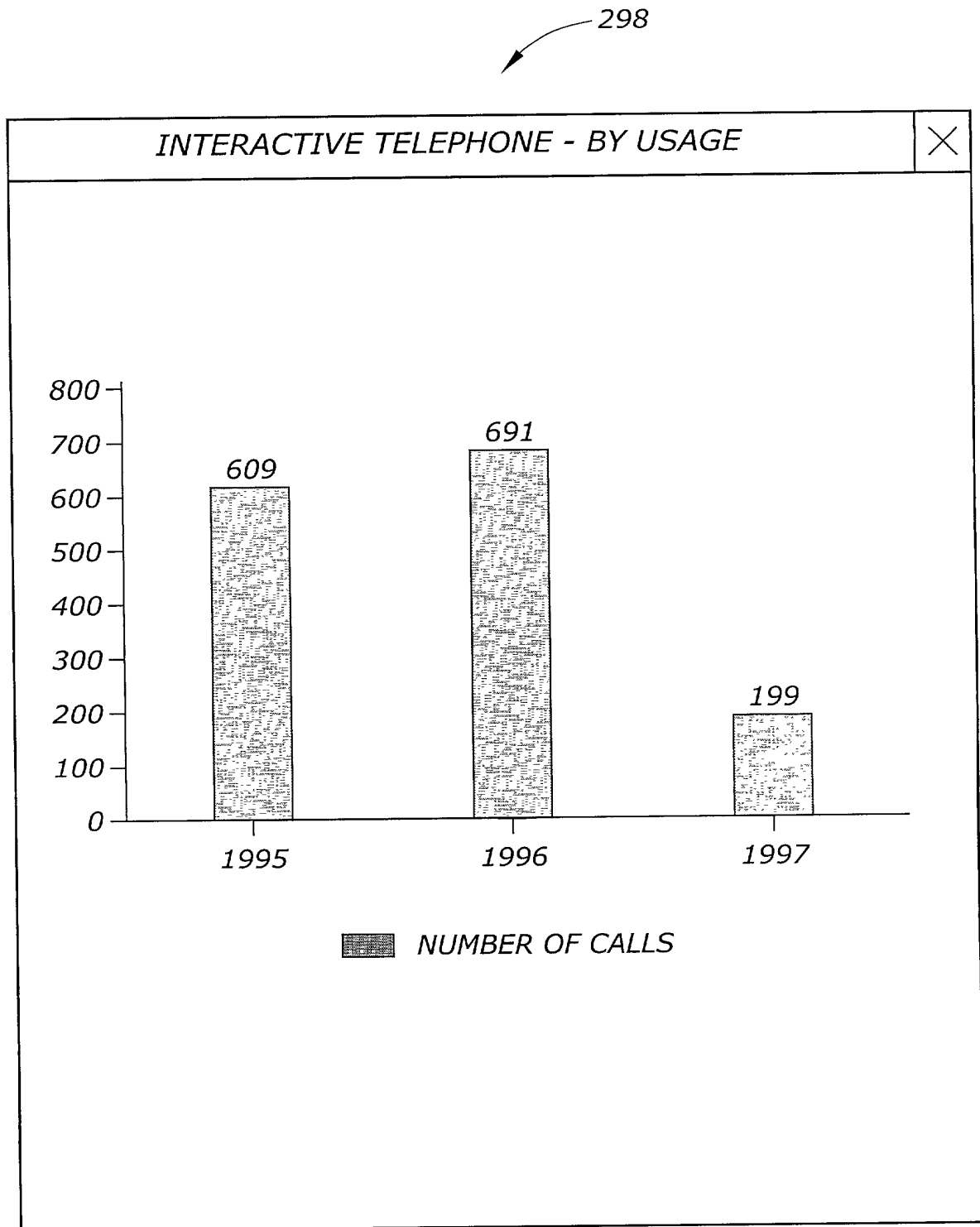


Fig. 23

300

PERSONAL LOGIN

HOME → PERSONAL LOGIN

EXIT SECURE  
AREA

ID:  302

PIN:  304

306

Fig. 24

308

310

RETIREMENT SERVICES

HOME → YOUR PERSONAL SUMMARY

NAME/AS OF MM/DD/YY

DEFINED CONTRIBUTION RETIREMENT PLAN(S)

PLAN NAME	ACCOUNT BALANCE	VESTED ACCOUNT BALANCE	LOAN BALANCE
COMPANY 1	\$31,899.68	\$21,188.68	\$2,711.00

VIEW DETAILS

DEFINED BENEFIT PENSION PLAN

PLAN NAME	VESTED BENEFIT	ESTIMATED BENEFIT
COMPANY 1	\$200.00 AS OF MM/DD/YY	\$1,000.00 AT AGE 65

Fig. 25

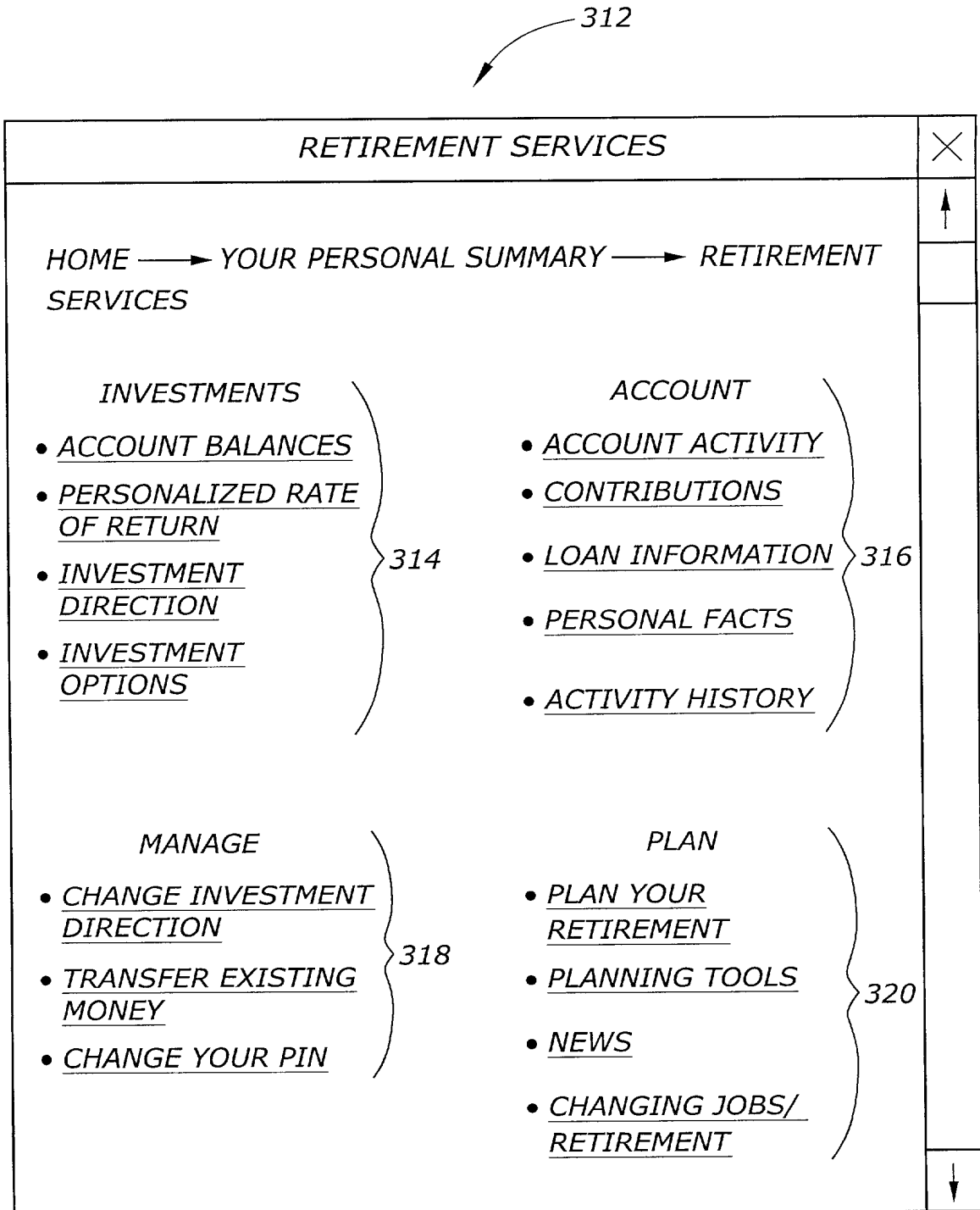


Fig. 26A

312










RETIREMENT SERVICES					×
ACCOUNT SUMMARY AS OF MM/DD/YY					↑
INVESTMENT	BALANCE	% OF TOTAL	NAV/UNIT VALUE	# OF SHARES/ UNITS	
 GUARANTEED INTEREST	\$2,478.12	8.49%	N/A	N/A	
 BOND AND MORTGAGE	\$4,136.04	14.17%	497	8.3	
 U.S. STOCK	\$8,137.80	27.88%	464	17.5	
 SMALL COMPANY BLEND	\$7,495.65	25.68%	20.2	370.2	
 INTERNATIONAL STOCK	\$6,941.07	23.78%	35.6	194.9	
TOTAL	\$29,188.68	100.00%	N/A		
RISK CATEGORY LEGEND					
 CONSERVATIVE	 MODERATE	 DYNAMIC	 AGGRESSIVE		↓

Fig. 26B

322

RETIREMENT SERVICES

✕

↑

HOME → YOUR PERSONAL SUMMARY → MAIN MENU  
 → CHANGE INVESTMENT

YOUR CURRENT INVESTMENT DIRECTION  
 (LAST CHANGED MM/DD/YY)

324 INVESTMENT	326 EMPLOYER	328 ELECTIVE DEFERRAL
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>           GUARANTEED INTEREST 5 YEAR         </div>	20.00%	20.00%
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; border: 1px solid black; background: repeating-linear-gradient(45deg, transparent, transparent 2px, black 2px, black 4px); margin-right: 5px;"></div>           BOND AND MORTGAGE         </div>	10.00%	10.00%
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; border: 1px solid black; background: repeating-linear-gradient(-45deg, transparent, transparent 2px, black 2px, black 4px); margin-right: 5px;"></div>           FUND ONE         </div>	20.00%	20.00%
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; border: 1px solid black; background: repeating-linear-gradient(0deg, transparent, transparent 2px, black 2px, black 4px); margin-right: 5px;"></div>           U.S. STOCK         </div>	10.00%	10.00%
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; border: 1px solid black; background: repeating-linear-gradient(90deg, transparent, transparent 2px, black 2px, black 4px); margin-right: 5px;"></div>           SMALL COMPANY BLEND         </div>	20.00%	20.00%
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; border: 1px solid black; background: repeating-linear-gradient(135deg, transparent, transparent 2px, black 2px, black 4px); margin-right: 5px;"></div>           INTERNATIONAL STOCK         </div>	15.00%	15.00%
1 SPECIALIZED HEALTH CARE	5.00%	5.00%

↓

Fig. 27A

322

**RETIREMENT SERVICES**
×

CHANGE MY INVESTMENT DIRECTION:
 ↑

INVESTMENT	ENTER PERCENTS
<input type="checkbox"/> GUARANTEED INTEREST 5 YEAR	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>
<input checked="" type="checkbox"/> BOND AND MORTGAGE	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>
<input type="checkbox"/> FUND ONE	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>
<input type="checkbox"/> U.S. STOCK	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>
<input type="checkbox"/> SMALL COMPANY BLEND	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>
<input type="checkbox"/> INTERNATIONAL STOCK	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>
1 SPECIALIZED HEALTH CARE	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>
TOTAL	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 20px; border: 1px solid black; margin-right: 5px;"></div> <span>%</span> </div>

↓

**Fig. 27B**

332

RETIREMENT SERVICES
 X

HOME → YOUR PERSONAL SUMMARY → MAIN MENU  
 → TRANSFER EXISTING MONEY

### TRANSFER EXISTING MONEY

INVESTMENT	BALANCE	FROM	TO	
<input type="checkbox"/> SUM OF GUARANTEED INTEREST	\$2,478.12	<input type="text"/> %	N/A	<div style="font-size: 4em;">}</div> 336
<input type="checkbox"/> GUARANTEED INTEREST 5 YEAR		<input type="text"/> %	<input type="text"/> %	
<input type="checkbox"/> MONEY MARKET	334	<input type="text"/> %	<input type="text"/> %	
<input checked="" type="checkbox"/> BOND AND MORTGAGE	\$4,136.04	<input type="text"/> %	<input type="text"/> %	
<input checked="" type="checkbox"/> U.S. STOCK	8,137.80	<input type="text"/> %	<input type="text"/> %	
<input checked="" type="checkbox"/> SMALL COMPANY BLEND	\$7,495.65	<input type="text"/> %	<input type="text"/> %	
<input checked="" type="checkbox"/> INTERNATIONAL STOCK	\$6,941.07	<input type="text"/> %	<input type="text"/> %	
<div style="text-align: right; font-weight: bold;">TOTAL TRANSFER BALANCE</div> <div style="text-align: right;">\$29,188.68</div>				

Fig. 28



338

**RETIREMENT SERVICES**
✕

HOME → YOUR PERSONAL SUMMARY → MAIN MENU  
 → TRANSFER EXISTING MONEY

**ALL CONTRIBUTION TYPES**

	340 INVESTMENT	342 CURRENT ALLOCATION		344 NEW ALLOCATION
<input type="checkbox"/> SUM OF GUARANTEED INTEREST		8.49%		10.00%
<input checked="" type="checkbox"/> BOND AND MORTGAGE		14.17%		15.00%
<input checked="" type="checkbox"/> U.S. STOCK		27.88%		25.00%
<input checked="" type="checkbox"/> SMALL COMPANY BLEND		25.68%		25.00%
<input checked="" type="checkbox"/> INTERNATIONAL STOCK		23.78%		25.00%
<b>TRANSFER BALANCE</b>		N/A		100.0%

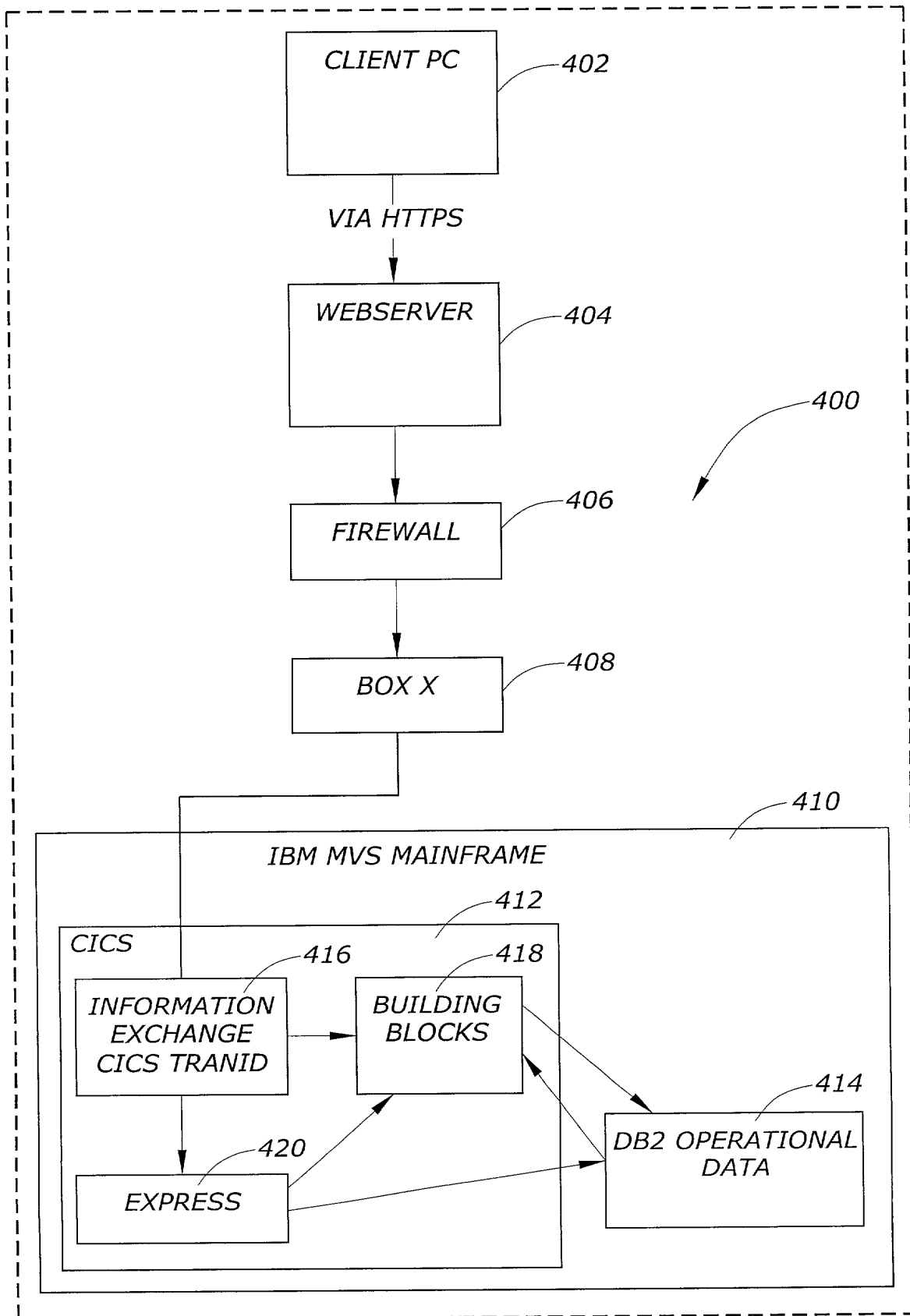
TO CONFIRM,  
 RE-ENTER PIN

346

348  
SUBMIT

350  
CANCEL

Fig. 29



*Fig. 30*